INSTRUCTIONS TO RENEW AN INDIVIDUAL MASTER LICENSE AND CONTRACTOR LICENSE

For assistance with creating an A&A account or finding or resetting your username and password, you will need to call the **OCIO Help Desk**: 515-281-5703 or 1-800-532-1174.

For assistance with navigating the licensing portal once you have an A&A account, please contact: **AMANDA Support Team at 1-855-824-4357** between 7:30am – 5pm Monday-Friday.

For specific questions regarding contractor registration, unemployment insurance requirements, workers compensation, or out of state contractor bonds, please contact the **Division of Labor** at contractor.registration@iwd.iowa.gov or 515-242-5871.

For specific questions regarding the **lowa Plumbing and Mechanical Systems** program or license requirements, please visit the website http://idph.iowa.gov/pmsb or call 1-866-280-1521.

BEFORE YOU BEGIN:

These instructions assume you have already followed the steps to create an A&A account and set up your AMANDA profile page, including linking your company to your individual license profile page. If you have not done these steps, go back to the IDPH Regulatory Programs Plumbing & Mechanical Systems Board Page https://idph.iowa.gov/regulatory-programs/pmsb and follow the instructions to create an account.

If you have followed the instructions to create an account and linked your contractor license to your account, you should see your company name listed in the left column once you logon to AMANDA. If you do not see your company name listed there, please **STOP** and contact the AMANDA Support Team at 1-855-824-4357.

The AMANDA application works best in Chrome and Safari. If you need to use Internet Explorer, you will need to change three settings in order for the portal to function properly: 1) pop up blocker must be turned off; 2) iowa.gov must be added to compatibility view; and 3) iowa.gov must be added to trusted sites. Contact the AMANDA Support Team if you need help with adjusting these settings for Internet Explorer.

Contractors who perform services in plumbing, HVAC, refrigeration, hydronics, or mechanical systems now have a "one-stop shop" to apply for both the contractor license and contractor registration on a single application. Previously contractors were required to apply/renew the license with the board office every 3 years and also submit a separate application and fee for contractor registration to lowa Workforce Development Division of Labor on an annual basis. Beginning with this renewal, contractor licensure and registration have been combined into a single 3-year application and renewal process. This means that you will be required to submit a fee for a 3-year contractor registration in addition to the contractor license renewal fee, and the documentation required by the Division of Labor for contractor registration.

DOCUMENTATION NEEDED:

<u>Medical Gas Piping Installers:</u> You will need your certification number, expiration date, brazing qualification number (if different) and brazing qualification expiration date. You must have a current medical gas certification to renew. No additional continuing education hours are needed.

<u>Continuing Education Course Information</u>: You will need the details of all the continuing education courses that you took to renew your license(s). You must be able to enter the course number, name of the course, date of the course, and number of hours awarded in each category (e.g. safety, code, trade). If you are an apprentice, you do NOT need to enter continuing education hours.

<u>Unemployment Insurance Number</u>: A valid unemployment insurance number (UI#) is required, even if you have no employees. To obtain a UI# visit www.myiowaui.org or contact Unemployment Insurance customer service at 888-848-7442 or email IWDuitax@iwd.iowa.gov.

<u>Workers Compensation Compliance Information</u>: A contractor with one or more employees must have either a Workers' Compensation Insurance certificate listing the "lowa Division of Labor" as a certificate holder or a Certificate of Relief issued by the Iowa Insurance Division. If you have no employees, you will select "I have no employees" for your compliance method.

<u>Master of Record Information</u>: You will need the license number, trade, and name for each individual serving as a master of record for your business. If you are a sole proprietor, you must personally hold the master licenses.

Bond and Insurance Information:

- IDPH Certificate of Liability.
 - o A minimum of \$500,000 general business liability coverage.
 - The certificate holder needs to be listed as the lowa Plumbing and Mechanical Systems Board, 321 East 12th Street, Des Moines, Iowa 50319.
 - o The certificate of liability needs a 10 day (minimum) cancellation notice.
- IDPH Surety Bond or continuation certificate:
 - Minimum amount of \$5,000.
 - The obligee for the bond must be listed as the customers of the principal. It cannot be the state of lowa or the Board. There have been bonds approved that used language such as, "licensee's lowa customers" or "Person(s) injured by Principal's breach of construction contract."
 - The surety bond also needs a 10 day (minimum) cancellation notice provided to the Iowa Plumbing and Mechanical Systems Board.
- IWD Out of State Contractor Bond or continuation certificate if you are an out of state contractor:
 - o File a \$25,000 surety bond at the time of registration or renewal.
 - o Bond is to be issued by a surety company licensed to do business in Iowa.
 - Complete the Division of Labor Out-of-state bond form. The out of state contractor bond form can be found at www.iowacontractor.gov – under Quick Links, click on "Out of State Contractor Bond Form."
 - Visit <u>www.iowacontractor.gov</u> and under Quick Links go to "Bond Requirements" for more details.
- IWD Worker's Compensation Insurance or Certificate of Relief:
 - A contractor with one or more employees must include a copy of Workers' Compensation Insurance certificate listing the "lowa Division of Labor" as a certificate holder or;
 - o Attach a copy of Certificate of Relief issued by the Iowa Insurance Division.
- IWD Notarized Fee Exemption Form:
 - If you are requesting an exemption from the Division of Labor registration fee, you must attach
 a copy of the Fee Exemption Form (Visit www.iowacontractor.gov and under Quick Links
 select "Fee Exemption Form" for more details).
 - This form must be notarized and applies only to the registration fee and NOT the PMSB license fee.

Note: You will need to attach a copy of your insurance and bond information to complete your renewal application. If you do not have a scanned copy, the information may be mailed but it will delay the processing of your renewal.

If you are unable to scan and complete the steps for adding attachments through the public portal, mail required attachments to:

Plumbing & Mechanical Systems Board ATTN: Contractor Renewal 321 E 12th St Des Moines, IA 50319-0075

PART 1: RENEW CONTRACTOR LICENSE

STEP 1: SIGN IN WITH EXISTING A&A ACCOUNT

- Begin by opening your web browser and navigating to the Iowa Department of Public Health Regulatory Program webpage at the following location: https://dphregprograms.iowa.gov/PublicPortal/Iowa/IDPH/common/index.jsp
- Sign in with your username and password.

STEP 2: UPDATE INDIVIDUAL PROFILE INFORMATION

- Verify all information is correct.
- Make any necessary corrections.
- To add additional addresses or contact information, click on the **Addresses** button.
- Click Continue when finished.

Optional: Add Other Addresses

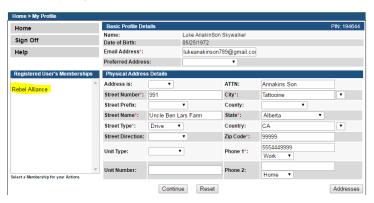
If you have additional addresses you would like to add or edit, click the Addresses button.

- Click the arrow button next to the address type (billing, business, home, mailing, old, or public address) and then click "Add Address." Enter the required fields.
- Be advised that the system currently also requires you to enter a billing, business, home, and mailing address. PMSB will not use these addresses for mailing or billing information. In these fields you should just click the button "Copy Physical Address."
- Click "Submit All Changes" when done. Confirm the submission again by clicking OK.
- Click "Continue" on the page where your physical address details display to be taken to My Programs page.

You will now be on the **My Programs** page. If you already hold a license and do not see it listed, please STOP and contact the AMANDA Support Team at 1-855-824-4357.

STEP 3: SELECT YOUR COMPANY

To proceed you will need to be linked with your existing contractor license. If you do not see your company in the Registered User's Membership box, **STOP** and contact the AMANDA Support Team at **1-855-824-4357** for assistance. If you see your company profile listed in the left column, click on the company name and then click **Continue**.



- Verify all information is accurate.
- To add additional addresses or contact information, click on the Addresses button.

STEP 4: REVIEW COMPANY PROFILE

It is **extremely** important that you review your company profile before proceeding to renew your license. Once you have selected your company from the list of memberships, click on **Company Profile.** Be sure to confirm the email address (your license certificate will be sent to

this email address if you have one on file) and company address.

Home

Public Search

My Profile

Company Profile

Member Management

Apply for a Program

Sign Off

Help

This email address if you have one on file) and company address.

May Profile

Company Profile

Member Management

Apply for a Program

Sign Off

Help

This in this email address if you have one on file) and company address.

Basic Profile

Company Name:

Rebel Alliance

Tax ID (EN) 15 NN:

To Company Profile

Public Search

Tax ID (EN) 15 NN:

To Profile

Profile

Profile

Profile

Address:

No Profile

Profile

Profile

Profile

Address:

No Profile

Public Search

My Profile

Public Search

My Profile

Public Search

Tax ID (EN) 15 NN:

To Public Search

Tax ID (EN) 15 NN:

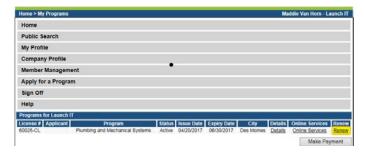
Phone 2: 7774449987 (Pager

If the email or address information is wrong, please STOP and contact the AMANDA Support Team at 1-855-824-4357. Address changes can also be submitted online here: https://idph.iowa.gov/regulatory-programs/address-change.

STEP 5: RENEW CONTRACTOR LICENSE

When you are on the **My Programs** page you will proceed through the application as a representative of the company. While acting on behalf of the company, you will not see your personal license information.

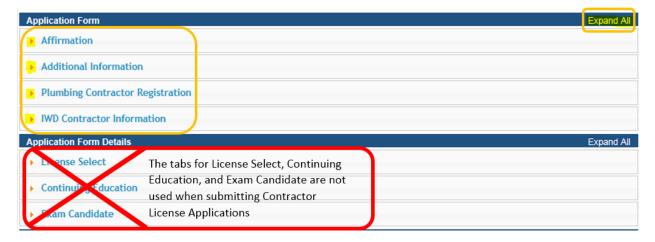
Click on the Renew link next to the license you would like to renew.



A pop-up message will appear. Click OK to confirm you wish to renew the license.

You will now be taken to the **Application Form** page for a contractor license renewal.

- Click Expand All to view information fields in Application Form Section.
- SKIP THESE TABS: License Select, Continuing Education, and Exam Candidate.



STEP 6 – ENTER AFFIRMATION QUESTIONS

- Under the Affirmation section, all questions must be answered.
- If you answer Yes to any of the questions, you must provide details in the corresponding question.

STEP 7 – ADDITIONAL INFORMATION

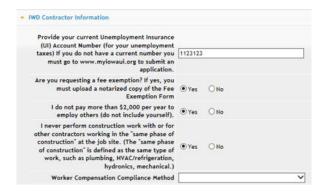
Select whether you provided an EIN or SSN to create your contractor license account.

STEP 8 - CONTRACTOR REGISTRATION

If you already have a contractor registration number with the Division of Labor, select **Yes.** Provide the number in the space provided. (This number begins with a "C.")

STEP 9 – IWD CONTRACTOR INFORMATION

All the fields in this section are required. Provide a response to each question. Note: If you are asking for a fee exemption from the registration portion of the fee, you must be able to answer "Yes" to all the questions in this section and you **must** attach the notarized fee exemption form. The fee exemption only applies to the Division of Labor registration fee and not the PMSB contractor license fee.



- Skip the next tabs you see for License Select, Continuing Education, and Exam Candidate – <u>Do NOT enter anything in these sections.</u>
- Click **Continue** to proceed with the application.

STEP 10 – IWD CONTACT LIST

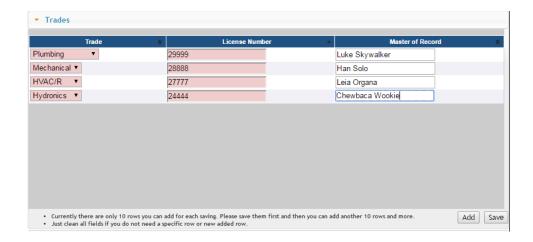
Click to expand this section. **NOTE:** Scroll to the right to see additional fields in this section. You should see at least one row for owner information.

- Click Add to add contacts. Click Save after completing each row.
- Repeat these steps for each contact.
- Click Continue when you have added all your contacts.

STEP 11 – TRADES (MASTER OF RECORD INFO)

Click to expand this section. You will see a list of the individuals currently serving as master of record in the various trades for your company.

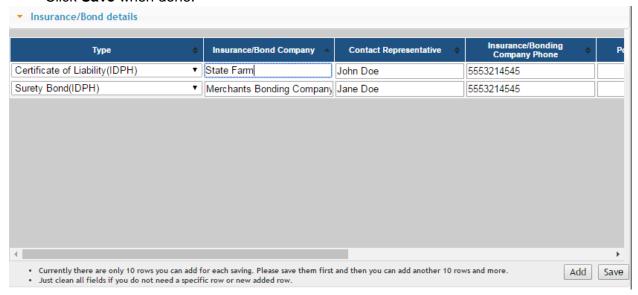
- If you have a new master of record, click Add.
- Select the trade and enter the license number of your master of record. (The name field will be automatically filled in when you click Save.)
- Click Save when done.
- Repeat these steps for each new master of record.
- Click Save if you have no changes.



STEP 12 – INSURANCE AND BOND DETAILS

Click to expand this section. If you have insurance and bond information on file, you will see some of the details filled out.

- Update any missing information for the surety bond (IDPH) or Certificate of Liability (IDPH).
- Click Add to add a new row.
- If you have workers compensation insurance, add a row and fill in the details related to your workers compensation insurance.
- If you are an out of state contractor, add a row and fill in the details for the out of state contractor bond here.
- Click Save when done.



STEP 13 - ADD ATTACHMENTS - CONTRACTOR LICENSE

To add any required documentation such as notarized fee exemption form, insurance and bond forms, you will need to click the **Add New Attachment** button. Skip this step if you do not have any attachments to add.



When clicked the Attachment Description area will expand.

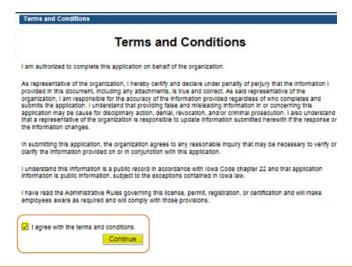


- To select a Type of attachment, click the dropdown arrow and select the attachment type.
 Ex: IWD Fee Exemption, PMSB Surety Bond, etc.
- Enter a **Description** of the file.
- Click Choose File button.
- This will open your file explorer, navigate to the directory where the file is you want to attach and double click it. The name of the document should be showing next to the Choose File button.
- Continue this process for each document you would like to attach.

NOTE: If you attach a document in error, <u>it cannot be removed by you</u>. You will need to contact the AMANDA Support Team to have it removed.

STEP 14 – TERMS AND CONDITIONS - CONTRACTOR

Please read the terms and conditions. If you agree, click the box next to I agree with the terms and conditions. Click **Continue**.



STEP 15 – MAKE A PAYMENT – PAY LATER!!!

Next you will be taken to the **Make Payment** page. Click the **Pay Later** button unless you do not want the 30% discount off the license renewal fee. For the discount to apply, you must submit both renewal applications on the same day and the applications must be for the same person (i.e. the company owner who also holds one or more master or journey licenses).

If you selected Pay Later, you will get a pop-up box that your application is not considered submitted until payment is made. Click OK.

 You will be returned to your My Programs page where you will see your contractor license listed with a status of "Renewal."

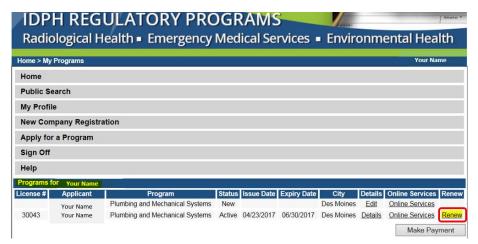
Important! For the multiple license discount to apply, you must click Pay Later and submit your individual license renewal information next (on the same day). You will have to come back to the contractor license renewal and Pay Later. This will ensure the discount is applied to both your contractor renewal application and your individual license renewal.

Return to your My Profile page.

PART 2: RENEW INDIVIDUAL LICENSE

STEP 16: RENEW INDIVIDUAL LICENSE

When you go back to **My Profile** you should see your individual profile information. Confirm the contact information and then click **Continue**. You should now see your list of licenses like the screenshot below. Find the row that has your master or journeyperson license number and click on the **Renew** button.



 After you click "Renew," a pop-up message will appear. Click **OK** to confirm you wish you renew the license.

You will now be taken to the **Application Form** page for an individual license renewal. **NOTES** for completing the Application Form:

 Click Expand All to view all information fields in a section or click on the small triangle button next to the Affirmation section.



STEP 17 - ENTER AFFIRMATION & EXEMPTIONS

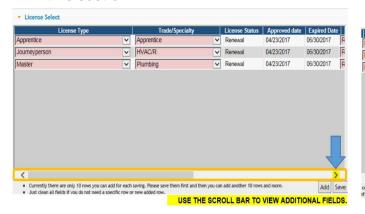
- Under the Affirmation section, all six questions must be answered.
- Under the "Continue Education" section, you must answer if you qualify for a CEU exemption.
- If you answer Yes to any of the questions, you must provide details in the corresponding question.

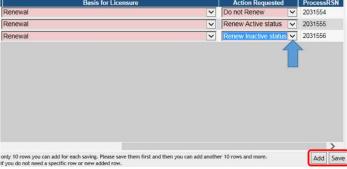
STEP 18 -SELECT INDIVIDUAL LICENSES FOR RENEWAL

Expand the License Select section by clicking on the small orange triangle next to this section.



You should now see a list of each of your licenses, showing the license type, trade, status, basis for licensure, etc. **NOTE: Scroll to the right to see all information that must be completed in this section.**





- Do not change the entries under Basis for Licensure these are automatically completed unless you are combining to a mechanical license (see optional next step).
- Under Action Requested, you must make a selection for each row. Select either Renew
 Active status, Renew Inactive status, or Do Not Renew.
- Click Save when done.

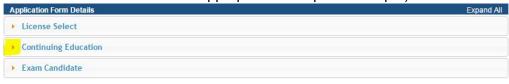
Optional: COMBINE TO MECHANICAL LICENSE

If you currently hold separate licenses in HVAC/R and hydronics at the same level (Journeyperson or Master) and wish to combine these licenses into a single mechanical license, you must follow these steps.

- Under Action Requested, select **do not Renew** for the HVAC/R license.
- Under Action Requested, select **do not Renew** for the hydronics license.
- Click Add to add a new row.
- For license type, select either journeyperson or master (must be same level as the HVAC/R and hydronics license).
- For trade/specialty, select **Mechanical**.
- Under basis for licensure, select Combine to Mechanical.
- Under Action Requested, select Renew active status or Renew Inactive Status if you
 want an inactive license.
- Click Save when done.

STEP 19 – ENTER CONTINUING EDUCATION COURSES

Expand the **Continuing Education** Section. Skip this step if you qualify for a CEU exemption (you must have selected "Yes" and the appropriate exemption in step 4).

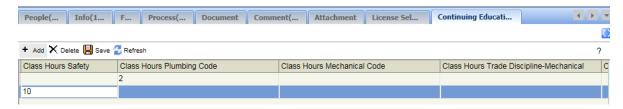


- Click Add to add a course.
- You must enter the course number (in format CEUC or CEUL), followed by course name, Course End Date (if it was taken on single day).
- For **course type** select Continuing Education unless it was an online course. Select Continuing Education E-Course if it was an online course.
- Enter the number of hours awarded for the course in the appropriate column(s), e.g. 2 hours safety, 2 hours plumbing code, etc.
- Click Save after completing each row.

• Repeat these steps for each additional course that you took.



Use the scroll bar on the bottom of this section to see additional columns.



For information about Continuing Education and required hours, visit the PMSB website: https://idph.iowa.gov/pmsb/continuing-education.

The next tab you see is called Exam Candidate – **Do NOT enter anything in this section.**

STEP 20 – OPTIONAL: ADD ATTACHMENTS

To add any required documentation such as criminal history documents, you will need to click the **Add New Attachment** button. Skip this step if you do not have any attachments to add.



When clicked the Attachment Description area will expand.

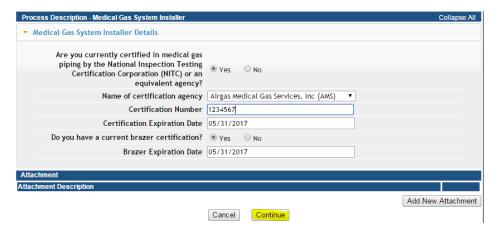


- To select a Type of attachment, click the dropdown arrow and select the attachment type. Ex: Court Documents, Certification, Diploma, etc.
- Enter a **Description** of the file.
- Click Choose File button.
- This will open your file explorer, navigate to the directory where the file is you want to attach and double click it. The name of the document should be showing next to the Choose File button.
- Continue this process for each document you would like to attach.

NOTE: If you attach a document in error, <u>it cannot be removed by you</u>. You will need to contact the AMANDA Support Team to have it removed.

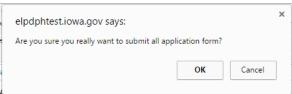
STEP 21 – MEDICAL GAS INSTALLER CERTIFICATION

If you have a medical gas installer certification, you will see a section called "Medical Gas System Installer Details." Click Expand All to view all information fields in this section or click on the small triangle button next to the details section. Provide a response to each question. If you do not have a separate brazer qualification expiration date, enter the same expiration date as your medical gas certification. Click **Continue** when done.



STEP 22 – CONTINUE TO SUBMIT APPLICATION

When all sections of the form are complete, click **continue**. If you need to gather information, or add additional documentation, you can leave the application webpage and return later to complete or continue.

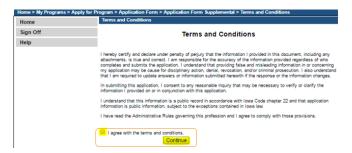


When you click **Continue**, a pop-up message will appear. Click **OK** to proceed to the next page. You may have to click **Continue** multiple times AND click **OK** multiple times.

DO NOT CLICK CANCEL – this will void your entire application.

STEP 23 – TERMS AND CONDITIONS

Please read the terms and conditions. If you agree, click the box next to I agree with the terms and conditions. Click **Continue**.

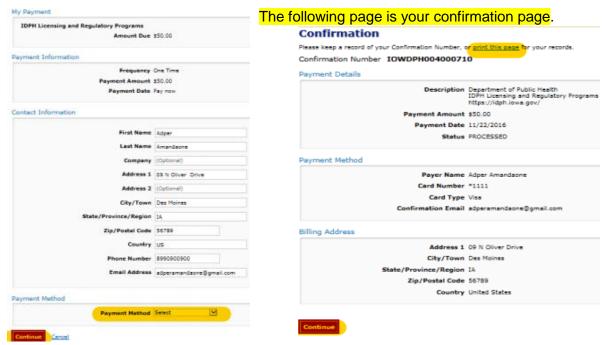


STEP 24 - MAKE A PAYMENT - INDIVIDUAL LICENSE(S)

Next you will be taken to the **Make Payment** page. Select **Pay Now** to be directed to the online payment system. You should see your licenses listed and a row for a license discount. If the fees appear to be wrong, **STOP** and contact the AMANDA Support Team at 1-855-824-4357. Select **Pay Now** when asked, and complete your online payment information.



Select Payment Method, and fill in your payment details. Click Continue.



Once you have submitted payment, you should keep a record of your **Confirmation Number** or print the receipt page that appears for your records. Click **My Profile** to return to your profile page or **My Programs** to return to your list of licenses.

PART 3: PAY FOR CONTRACTOR LICENSE

STEP 25 - RETURN TO COMPANY PROFILE

Next you need to return to **My Profile** to pay for your contractor license renewal. Click on **My Profile**, then click on your company name under Registered User Memberships.



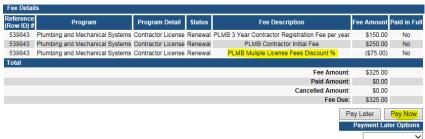
Click on Continue.

You will see a list of the licenses associated with your company, and then a button for Make Payment.

Programs for The Plumbing & Heating Shop									
License #	Applicant	Program	Status	Issue Date	Expiry Date	City	Details	Online Services	Renew
51928		Plumbing and Mechanical Systems	Active	04/01/2016	06/30/2017	Sumner	<u>Details</u>	Online Services	
51928		Plumbing and Mechanical Systems	Renewal			Sumner	<u>Details</u>	Online Services	
								Make F	ayment

STEP 26 – MAKE PAYMENT: CONTRACTOR RENEWAL FEES

Click **Make a Payment.** You should now see the contractor license fee, contractor registration fee, and a discount fee.



Select **Pay Now** when asked, and complete your online payment information for the contractor fees. At the end of the payment process you will have to click **Continue.** You will be presented with a receipt page that you should print for your records.

Click **My Profile** to return to your profile page or **My Programs** to return to your list of business licenses.

CHECK STATUS

Once you have submitted payment, your renewal applications will be reviewed by PMSB staff. Your applications will **NOT** be reviewed until a payment has been made.

To issue a contractor license and contractor registration, you must either submit a copy of the following attachments online or mail the documents to the PMSB office and indicate they are for a pending contractor renewal application. The fastest route is to attach the documents online. Expect significant delays if you mail this information rather than attaching it online.

- Proof of IDPH Certificate of Liability;
- IDPH Surety Bond or continuation certificate;
- IWD Out of State Contractor Bond or continuation certificate if you are an out of state contractor;
- IWD Worker's Compensation Insurance or Certificate of Relief; and
- IWD Notarized Fee Exemption Form (if requesting registration fee exemption)

If you are unable to scan documents and complete the steps for adding attachments through the public portal, mail required attachments to:

Plumbing & Mechanical Systems Board ATTN: Contractor Renewal 321 E 12th St Des Moines, IA 50319-0075

Information for your Division of Labor contractor registration will be sent electronically to the Division of Labor. Payment for the "registration" portion of the fee will also be sent electronically to the Division of Labor unless you indicated you have a fee exemption. The Division of Labor must approve and issue your contractor registration number before your PMSB contractor license can be renewed or issued.

Renewal applications for your individual (master or journey) license are processed much faster than the contractor license. Processing of the contractor renewal application can take up to four

weeks due to the need to review all bond and insurance documents and ensure a contractor registration number has been issued.

Once your renewal has been paid for and all information is complete including required attachments, the status online will show "Ready to Issue" or you will see the license listed with a status of "Active" and an expiry date of 6/30/2020. If the expiry date does not say 6/30/2020, the renewal application has not been approved yet.

When the renewal has been approved, you will be automatically emailed a copy of your new license certificate and wallet card. The email for your individual license will be sent to the email address listed under **My Profile**. The contractor license will be emailed to the email address listed under the **Company Profile**. NOTE: This may be a **different** email address than the one you provided for your individual account.

Go to your **Company Profile** to see the email address on file for the company. If you need to change the email or physical address of the company, please contact the **AMANDA Support Team** 1-855-824-4357.

The license certificates and wallet cards will be sent as a PDF attachment. You may print the PDF or have it available for display on your electronic device. If there was an error sending to the email address you provided, the license certificate and wallet card will be printed by PMSB staff and mailed to the address on file.